DOCUMENT RESUME

ED 249 194 SP 025 272

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TITLE Creative Financing in the General Physical Education Program.
PUB DATE 84
NOTE 10p.; Paper presented at the National Convention of the American Alliance for Health, Physical Education, Recreation and Dance (Anaheim, CA, March 29-April 2, 1984). Broken print may not reproduce clearly.
PUB TYPE Speeches/Conference Papers (150) -- Reports - Descriptive (141)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS *Athletics; Financial Needs; *Financial Problems; *Fund Raising; Higher Education; *Physical Education; Physical Education Facilities; *Program Costs

ABSTRACT

The difficulties faced by colleges and universities in financing physical education programs are discussed. It is pointed out that the most popular physical activities at the higher education level (such as tennis, golf, scuba diving) require very expensive programs in terms of specialized equipment, transportation, or specialized instruction. Measures for raising revenue and financing strategies are discussed. Ways in which institutions have used faculty and exisiting facilities to good advantage are described. A list of 37 minor revenue-producing activities is provided. (JD)

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CREATIVE FINANCING IN THE GENERAL PHYSICAL EDUCATION PROGRAM

BY

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IT IS HIGHLY UNLIKELY THAT THOSE OF YOU IN THIS ROOM TODAY WOULD HAVE CHOSEN TO ATTEND A SESSION ON CREATIVE FINANCING OF THE GENERAL PHYSICAL EDUCATION PROGRAM AS LITTLE AS TEN, PERHAPS EVEN FIVE YEARS AGO. BUT TIMES HAVE CHANGED - AND OH, HOW THEY HAVE CHANGED. TEN YEARS AGO WE WERE FIGHTING THE BATTLE TO KEEP PHYSICAL EDUCATION IN THE CURRICULUM, AND ACCORDING TO THE RECENT NATIONAL SURVEY CONDUCTED BY TOM TRIMBLE AND LARRY HENSLEY, ... MOST PHYSICAL EDUCATION DEPARTMENTS WON THAT BATTLE, ALTHOUGH THE PROGRAM PERHAPS HAS TAKEN A SOMEWHAT DIFFERENT SHAPE OR FORM, I.E. FROM A REQUIRED TO AN ELECTIVE PROGRAM. MOST INSTITUTIONS TODAY REPORT THAT THEIR PROGRAMS ARE STRONGER THAN EVER, BOTH IN STUDENT SUPPORT AS WELL AS IN FACULTY / ADMINISTRATIVE SUPPORT. PHYSICAL ACTIVITY, WELLNESS, AND PHYSICAL FITNESS ARE "IN" AND NO ONE SEEMS TO DISPUTE THEIR PLACE IN THE CURRICULUM.

SO, TODAY WE HAVE OUR PROGRAMS IN PLACE, WE HAVE AN ACCEPTING PUBLIC, BUT WE ARE CONFRONTED WITH A NEW "MONSTER" - CAN WE "AFFORD" THE DELIVERY SYSTEM. THE ALMIGHTLY DOLLAR APPEARS TO BE A MAJOR OBSTACLE IN OUR ABILITY TO MEET A MISSION THAT THE INSTITUTION, YES, EVEN SOCIETY, WANTS US TO MEET.

SOME REASONS FOR THE DILEMMA ARE RATHER OBVIOUS, BUT OTHERS ARE MORE SUBTLE. THE OBVIOUS REASONS ARE:

1. THE SIGNIFICANT INCREASE IN THE COST OF EQUIPMENT NEEDED TO PROVIDE STUDENTS WITH THE INVENTORY NEEDED FOR PARTICIPATION IN THE TRADITIONAL "BREAD AND BUTTER" OFFERINGS, E.G. BASKETBALL, VOLLEY-BALL, ETC.

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2. THE SHIFTING CURRICULAR INTERESTS OF STUDENTS TO MORE INDIVIDUAL AND DUAL PARTICIPATION ACTIVITIES WHICH REQUIRES THAT EACH INDIVIDUAL BE PROVIDED WITH EQUIPMENT, MUCH OF IT RATHER SOPHISTICATED AND EXPENSIVE, E.G. SCUBA EQUIPMENT, ARCHERY, FENCING, ETC.
3. THE COSTS INCURRED IN PROVIDING TRANSPORTATION TO INSTRUCTIONAL SETTINGS OFF THE CAMPUS, E.G. BOWLING ALLEYS, SCUBA TRIPS, SNOW SKIING TRIPS, ROLLER SKATING, ETC.
4. THE COST OF HIGHLY SPECIALIZED INSTRUCTION FOR MANY ACTIVITIES FOR WHICH THE MEMBERS OF THE FACULTY HAVE LITTLE BACKGROUND OR PREPARATION.

INSERT #1

THE STUDY DONE BY TRIMBLE AND HENSLEY IDENTIFIES THE CURRENT MOST POPULAR ACTIVITIES TAUGHT IN COLLEGES AND UNIVERSITIES. OF THE TWELVE MOST POPULAR ACTIVITIES, 8 ARE VERY EXPENSIVE OFFERINGS EITHER IN TERMS OF SPECIALIZED EQUIPMENT, TRANSPORTATION REQUIRED, OR THE COST OF SPECIALIZED INSTRUCTION:

1 RACQUETBALL
3 TENNIS
5 WEIGHT TRAINING
6 SNOW SKIING
8 SCUBA DIVING
10 GOLF
11 MARTIAL ARTS
12 BOWLING

WE ASK OURSELVES "HOW CAN WE CAPITALIZE ON THIS WIDESPREAD CAMPUS INTEREST IN OUR PROGRAM - WITHOUT THE DOLLARS TO DELIVER THIS PRODUCT THAT IS IN DEMAND?"

MORE SUBTLE FACTORS ALSO HAVE HAD A PROFOUND IMPACT ON THE GENERAL PROGRAM. SOME ARE:

1. COSTS IN OTHER AREAS OF THE CURRICULUM HAVE ALSO INCREASED DRAMATICALLY. THE UNDERGRADUATE MAJORS PROGRAM AND THE GRADUATE PROGRAMS ARE COMPETING FOR THE LIMITED DOLLARS AVAILABLE IN THE DEPARTMENT.
2. UNDERGRADUATE AND GRADUATE PROGRAMS HAVE ALSO HAD TO EXPAND THEIR MISSION TO KEEP THE NUMBERS OF STUDENTS AT A SATISFACTORY LEVEL. THESE NEW MISSIONS HAVE INCREASED THE DEMANDS NOT ONLY FOR BUDGET, BUT FOR FACULTY TIME AND ENERGY.
3. COLLEGE / UNIVERSITY BUDGETS HAVE BEEN SIGNIFICANTLY REDUCED IN MANY STATES, IF NOT IN "TOTAL" DOLLARS, AT LEAST IN "REAL" DOLLARS NEEDED TO PURCHASE EQUIPMENT AND SERVICES.

ALL OF THESE FACTORS ARE FORCING PHYSICAL EDUCATION ADMINISTRATION INTO METHODS OF CREATIVE FINANCING" IN ORDER TO KEEP THE GENERAL PROGRAM, THE MAJORS PROGRAM, AND THE GRADUATE PROGRAM VIABLE. WHEN ONE LOOKS AT THE POTENTIAL THAT THESE PROGRAMS HAVE FOR SUPPLEMENTING DEPARTMENTAL FUNDING, THE GENERAL PROGRAM AFFORDS FOR GREATER OPPORTUNITIES FOR INCOME THAN DO THE UNDERGRADUATE AND GRADUATE PROGRAMS OF THE DEPARTMENT.

1. THE GENERAL PROGRAM IS GENERALLY LARGER WHICH ENABLES EACH CREATIVE FINANCING STRATEGY TO HAVE GREATER ECONOMIC IMPACT.
2. THE CREATIVE FINANCING IS BEING SHARED AND ABSORBED BY A GREATER POPULATION, NOT ONLY THE PHYSICAL EDUCATION STUDENT.

TO FINANCE THESE PROGRAMS, 23% OF THE 600+ INSTITUTIONS REPORTING IN THE STUDY ARE CHARGING EXTRA FEES OF SOME TYPE TO SUPPORT THEIR GENERAL PHYSICAL EDUCATION PROGRAM. MANY OTHERS RESPONDED "NOT YET, BUT WERE CONSIDERING IT". I HAVE CLASSIFIED THE EXTRA ASSESSMENTS IN THREE CATEGORIES:

1. DIRECT STUDENT ASSESSMENT (THESE FEES RANGED FROM $2 TO $20)
2. INDIRECT STUDENT ASSESSMENT
3. EXTERNAL SOURCES OF FUNDING

I HAVE ALSO ATTEMPTED TO FACTOR THE SIZE OF THE INSTITUTION AND THE PRIVATE VS. PUBLIC BASE TO DETERMINE WHETHER THERE ARE DIFFERENT STRATEGIES BEING EMPLOYED.

INSERT # 4 AND # 5

NOTE THAT BOTH UNIVERSITIES AND COLLEGES ARE UTILIZING "DIRECT STUDENT ASSESSMENT" MORE THAN "INDIRECT STUDENT ASSESSMENT" OR "EXTERNAL FUNDING SOURCES." BOTH LAB FEES AND EXTRA FEES FOR SPECIAL COURSES ARE THE MOST COMMON. IT ALSO APPEARS THAT COLLEGES USE A GREATER VARIETY OF "EXTERNAL FUNDING SOURCES" THAN DO UNIVERSITIES.

WHEN COMPARING PUBLIC AND PRIVATE INSTITUTIONS, WE SEE MORE DIRECT ASSESSMENT STRATEGIES IN PUBLIC INSTITUTIONS THAN PRIVATE AND DIFFERENT PATTERNS OF EXTERNAL FUNDING SOURCES BETWEEN THE TWO TYPES OF INSTITUTIONS.

IT IS OBVIOUS THAT CREATIVE FINANCING STRATEGIES DO EXIST IN MORE THAN 20% OF THE INSTITUTIONS REPORTING. IT ALSO APPEARS THAT CREATIVE FINANCING IS EXPANDING INTO MORE APPROACHES, AND THAT IT IS MEETING WITH APPARENT SUCCESS.

A FEW INSTITUTIONS REPORTING HAD A UNIQUE APPROACH WHICH DID NOT FIT ON THE TABLE YOU'VE OBSERVED.

1. ONE SAID, "WE PRAY ALOT"
2. ANOTHER, "I'LL TAKE THE 5TH AMENDMENT"

SOME OF THE MEASURES IDENTIFIED IN THE TRIMBLE AND HENSLEY STUDY THAT ARE CURRENTLY IN USE INCLUDE:

REVENUE "SAVING" MEASURES IDENTIFIED
(A PENNY SAVED IS A PENNY EARNED)

1. REQUIRE STUDENTS TO SUPPLY EXPENDABLE SUPPLIES: TENNIS BALLS, SHUTTLECOCKS, RACQUETBALL PADDLES, ETC.
2. REQUIRE STUDENT TO FURNISH THEIR OWN TRANSPORTATION TO OFF-CAMPUS TEACHING STATIONS SUCH AS BOWLING ALLEYS, SKIING AREAS, BACKPACKING SITES, ETC.
3. SHARING AND JOINT PURCHASING OF EQUIPMENT BETWEEN PHYSICAL EDUCATION, RECREATION, ATHLETICS AND INTRAMURAL PROGRAMS, ETC. (ENVIRONMENTAL ED BOUGHT 4 CANOES AT ONE INSTITUTION)
4. UTILIZATION OF MORE PART-TIME FACULTY AS THEY TYPICALLY COST LESS WHEN PAID ON AN HOURLY SCALE.
5. ALL OFF-CAMPUS AND EVENING COURSES OFFERED THROUGH DIVISION OF CONTINUING EDUCATION. THIS UNIT (DCE) PAYS FOR THE INSTRUCTION AND THE DEPARTMENT OF PHYSICAL EDUCATION IS CREDITED FOR THE STUDENT CREDIT HOURS GENERATED.
6. ONE SMALL COLLEGE WITH A NON-CREDIT ELECTIVE PROGRAM HIRES EXPERTS FROM OUTSIDE THE COLLEGE TO TEACH ACTIVITIES STUDENTS WANT. STUDENTS PAY CLASS FEES WHICH ARE GIVEN TO THE INSTRUCTION. DIRECTOR OF ATHLETICS APPROVES FEE STRUCTURE.
7. UTILIZE OUTSIDE AGENCIES TO TEACH COURSES.

MINOR REVENUE PRODUCERS IDENTIFIED

1. CAR WASHES
2. DANCES
3. SALES OF INSTITUTION RELATED SUPPLIES: DECALS, SWEATSHIRTS, ETC.
4. JOG-A-THONS, FUN RUNS, MARATHONS
5. FOOD SALES (CAKES, COOKIES, ETC.)
6. RAFFLES
7. REQUESTING DONATIONS AT ATHLETIC EVENTS
8. ADMISSION FEES FOR DEMONSTRATIONS AND ATHLETIC EVENTS
9. FEES FOR CAMPUS FACULTY-STAFF FITNESS PROGRAMS
10. GIFTS FROM MAJORS CLUB ACTIVITIES
11. FEES COLLECTED FOR PROGRAMS AND/OR TESTING IN ADULT FITNESS, KINESIOLOGY AND MOTOR LEARNING CLINICS
12. CLINICS, WORKSHOPS AND/OR CONTESTS IN SPECIFIC ACTIVITY AREAS WITH REVENUES GOING DIRECTLY INTO EQUIPMENT FOR THE ACTIVITY AREAS INVOLVED: (TENNIS CLINICS, GOLF WORKSHOPS, PUTTING TOURNAMENTS, BASKETBALL FREE-THROW CONTESTS, ETC.)
13. SMALL FEE CHARGED FOR STUDENTS TAKING COURSES BEYOND REQUIREMENT
14. SPONSORSHIP OF LOCAL, REGIONAL AND NATIONAL CHAMPIONSHIP EVENTS
16. ADDITIONAL FEE CHARGED FOR PROFICIENTY (COMPETENCY) TESTING
17. PARTICIPANTS IN EARLY MORNING AND/OR NOON SWIMMING PAY FEES TO OFFSET OPERATIONAL COSTS OF THE POOL
18. FACILITY "DEADTIME" IS SCHEDULED TO ALLOW USAGE BY LOCAL COMMUNITY MEMBERS ON A CLUB BASIS. MEMBERSHIP FEES ARE CHARGED IN EXCHANGE FOR USE OF FACILITIES. THIS IS ALSO DONE WITH CORPORATIONS TO PROVIDE MIDDAY AND AFTER-WORK RECREATION AND/OR FITNESS PROGRAMS AND/OR FACILITIES.

MODERATE - SUBSTANTIAL REVENUE PRODUCERS IDENTIFIED

1. CONDUCT CLINICS, WORKSHOPS, AND/OR MASTER CLASSES.
2. EQUIPMENT RENTALS - GOLF CLUBS, SKIN AND SCUBA EQUIPMENT, ROLLER SKATES, CAMPING EQUIPMENT, ETC.
3. SPECIAL FEE CHARGES FOR ALL COURSES USING EXPENDABLE EQUIPMENT AND/OR MATERIALS (ARCHERY TARGETS, RACQUETS, BATS, BALLS, ETC.).
4. SPORTS CAMPS, DURING TERM, INTERTERM AND SUMMER FOR CHILDREN: TENNIS, GOLF, GYMNASTICS, SWIMMING, DANCE, ETC.
5. CHARGE MODEST TOWEL AND LOCKER USAGE FEES.
6. FACILITY (SPACE RENTALS, PARTICULARLY TO COMMUNITY AGENCIES: SQUARE DANCE CLUBS, SPORTS CLUBS, ETC.
7. FACILITY USE FEE FOR ALL INDIVIDUALS NOT INVOLVED IN INSTITUTIONALLY SPORSORED ACTIVITIES.
8. SELECTED COURSES TAUGHT AT STUDENT RESIDENCE HALLS WITH SOME FINANCIAL SUPPORT COMING FROM THESE UNITS FOR PROVIDING THIS CONVENIENCE.
9. TEACHING NON-CREDIT COURSES TO GENERAL PUBLIC WITH FUNDS GENERATED GOING INTO DEPARTMENTAL ACCOUNT (IN KEEPING WITH PUBLIC SERVICE MISSION OF THE INSTITUTION).
10. ROYALTIES FROM TEXTS ASSIGNED FOR COURSE WORK (INSTITUTIONALLY AUTHORED TEXTS? VOLUME SALES DISCOUNTS?)
11. CONTRIBUTIONS BY ALUMNI AND COMMUNITY ORGANIZATIONS AND BUSINESS.
12. CERTAIN CLASSES (BALLET & JAZZ IN ONE CASE) ARE CONSIDERED TO PROVIDE SEMI-PRIVATE LESSONS, THEREFORE, AN ADDITIONAL PER TEAM FEE IS CHARGED.
13. ESTABLISH GIFT INCOME ACCOUNT THROUGH OFFICE OF INSTITUTIONAL DEVELOPMENT.
14. CONTRACT WITH OUTSIDE AGENCIES TO TEACH COURSES. STUDENTS PAY FEES IN ADDITION TO TUITION IN ORDER TO TAKE THESE COURSES. MOST OFTEN THE CONTRACTOR SUPPLIES ALL EQUIPMENT NEEDED (SCUBA, EQUITATION, CANOEING, RAFTING, ROCK CLIMBING, ETC.) AND RECEIVES FEES FROM STUDENTS DIRECTLY.

15. CHARGE A "LAB," "USER," OR "SERVICE" FEE FOR ALL ACTIVITY COURSES. SOME INSTITUTIONS UTILIZE AN UPWARD SCALE OF THIS FEE BASED ON SKILL LEVEL DESIGNATION--BEGINNER, INTERMEDIATE OR ADVANCED.
16. OBTAIN SERVICE AND RESEARCH PROJECTS AND GRANTS FROM GROUPS OUTSIDE OF THE UNIVERSITY.
17. TOWEL AND LOCKER FEES--IT WILL BE NOTED THAT THIS ITEM WAS LISTED PREVIOUSLY. HOWEVER, WHEN THE TOWEL, LOCKER AND SERVICE FEE PER TERM IS $5 PER STUDENT, $10 PER FACULTY-STAFF AND $30 PER NON-AFFILIATED USER, THESE REVENUES COULD BE SUBSTANTIAL AT LARGE INSTITUTIONS.
18. OPEN CLASSES TO COMMUNITY ON A FEE, NON-CREDIT BASIS.
19. USE GRADUATE STUDENTS AND SENIOR LEVEL INTERNS TO TEACH IN GENERAL PROGRAM WHEN THEY QUALIFY FOR FEDERALLY OR STATE SUPPORTED WORK-STUDY AND FINANCIAL AID PROGRAMS.

THESE STRATEGIES RAISE A NUMBER OF IMPORTANT PHILOSOPHICAL QUESTIONS WHICH SHOULD BE ADDRESSED BY FACULTY AND ADMINISTRATORS:

(1) IF ACADEMIC CREDIT IS GIVEN, SHOULD STUDENT BE ASSESSED EXTRA FEES OUTSIDE OF TUITION?

EACH STATE, PERHAPS EACH INSTITUTION, ESTABLISHES ITS OWN POSITION. THE BOARD OF REGENTS OF THE STATE OF GEORGIA HAS ISSUED A MANDATE WHICH STATES THAT NO LAB FEES MAY BE COLLECTED BY THE UNIVERSITY FOR INSTRUCTIONAL PROGRAMS WITHOUT BOARD OF REGENTS APPROVAL. HOWEVER, FEES CAN BE COLLECTED BY AN OUTSIDE VENDOR FOR TEACHING SUPPORT SERVICES. SINCE AN OPTIONAL LOCKER AND TOWEL FEE IS CONSIDERED A GENERAL SERVICE TO THE FACULTY AND STUDENTS, IT MAY ALSO BE CHARGED.

(2) IF PHYSICAL EDUCATION IS PART OF THE ACADEMIC PROGRAM, WHY SHOULD EQUIPMENT FOR CLASSES NOT BE PROVIDED AS IN OTHER CLASSES?

MANY ARGUE THAT CONTINUED PARTICIPATION IN AN ACTIVITY REQUIRES EQUIPMENT. IF THE STUDENT PURCHASES THE EQUIPMENT ARE THEY MORE LIKELY TO CONTINUE.

(3) IF CREATIVE FINANCING IS USED DURING TIGHT BUDGET TIMES, WILL IT BE REQUIRED TO CONTINUE WHEN TIMES ARE BETTER BECAUSE IT HAS BECOME AN ESTABLISHED PRACTICE.

(4) IF CREATIVE FINANCING STRATEGIES ARE USED, WILL PART OR MOST OF THE MONEY BE DIVERTED TO SUPPORT OTHER PROGRAMS WITHIN THE DEPARTMENT OR PERHAPS EVEN IN PROGRAMS OUTSIDE THE DEPARTMENT. SHOULD STUDENTS IN THIS PROGRAM PAY FOR OTHER PROGRAMS? IS THERE A DIFFERENCE BETWEEN THE USE OF DIRECT AND INDIRECT CHARGES TO SUPPORT VARIOUS PROGRAMS?

(5) IS IT ETHICAL TO HIDE THE INSTRUCTIONAL COSTS FOR PHYSICAL EDUCATION UNDER SOME OTHER LABEL, SUCH AS A LOCKER FEE, ETC. WILL THESE PRACTICES REFLECT NEGATIVELY ON THE DEPARTMENT, AND EVEN THE DISCIPLINE?

END

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